



"Those who have been blessed should share their blessings with the world. It's all God's. We are just the caretakers."

-Terry and late husband Chuck Glaser
Catholic Charities supporters

What is Planned Giving?

Planned giving is also known as charitable gift planning or legacy giving. It enables philanthropic individuals to make larger gifts to charitable organizations than they would normally make from ordinary income.

Discover the Benefits of a Planned Gift.

What are the Different Types of Planned Gifts?

Bequests

A bequest usually a set dollar amount or percentage of an estate that goes to a nonprofit after the donor's death. It is a gift made through a will or living trust. It's the most popular planned gift; the easiest to make; and costs nothing during a donor's lifetime.

Gifts of an IRA or 401K

A qualified charitable distribution (QCD) allows individuals who have an IRA or 401K and are 70 & 1/2 years or older to donate up to \$100,000 total to one or more charities directly from their taxable IRA instead of taking their required minimum distributions.

Life Insurance

A donor can designate a charity as a life insurance beneficiary. When the times comes, the nonprofit receives the proceeds. The donor's heirs benefit as well because policy proceeds distributed to a nonprofit are exempt from estate taxes.

Appreciated Securities

Publicly traded appreciated securities that a donor has owned for more than one year can be transferred to a nonprofit organization. The donor gets an income tax charitable deduction based on the fair market value of the securities while also avoiding capital gains tax.

Donor Advised Funds

A donor advised fund is like a charitable investment account for the sole purpose of supporting charitable organizations that you care about. The donor can immediately take a tax deduction and the remaining funds can be invested for tax free growth.

Charitable Gift Annuity

Charitable gift annuities allow you to share your assets with a nonprofit organization in a plan that gives you income while passing on the remainder to someone of your choosing.

We strongly suggest that you consult your attorney or a financial advisor. Gifts to Catholic Charities should be made to:

Catholic Charities Diocese of Toledo
1933 Spielbusch Avenue
Toledo, Ohio 43604.
EIN: 34-4428254

Contact Tom Waniewski at 419-214-4890 or twaniewski@toledodiocese.org for more information on how to give.
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